

**The National Library of Medicine**  
**EXHIBIT MANAGEMENT MANUAL**

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## THE EXHIBITING OPPORTUNITY

Exhibits at professional and scientific meetings have received top ratings when compared to other sources for purchasing information. Exhibits outscore trade publications and sales representatives in providing information on the latest trends and technologies in the industry and provide information to help to evaluate specific products and services. They also rate highly for “hands-on” product details –seeing what the product looks like, evaluating how it works and evaluating competitive products.

The NLM/NNLM exhibit schedule seeks to:

- ❑ Inform health care professionals, intermediaries and health care consumers about products and services of NLM.
- ❑ Answer questions related to NLM products and services.
- ❑ Gather and report feedback from customers on products and services.
- ❑ To evaluate, test and introduce new products.
- ❑ Maintain awareness of current trends in the industry.
- ❑ Increase visibility while identifying NLM as the leader in biomedical information technology research, developers of information systems and national support/outreach.
- ❑ Provide opportunities for networking and cultivating professional contacts.

The purpose of this manual is to provide the Exhibits Coordinator guidance in planning for, executing, and evaluating a successful exhibit program. Most importantly it is your guide to make exhibiting easy and, in fact, fun. None of this is new or unfamiliar territory. It is something you do every day as a professional. The exhibit booth can be viewed as an extension of public service and patron education. The only difference is that you are taking your skills on the road.

Workbooks, trade journals and seasoned exhibitors were studied and consulted in preparation for writing this manual. It is suggested that you read through it once to familiarize yourself with exhibit management and then use it as an effective reference tool for managing your exhibit program.

Questions about this manual and the exhibit program should be directed to Angela Ruffin, NLM at (301) 496-4777 or [ruffina@mail.nlm.nih.gov](mailto:ruffina@mail.nlm.nih.gov)

# SETTING OBJECTIVES AND MEASURING RESULTS

## Objectives

Setting objectives is the first activity necessary in order to measure the effectiveness of exhibiting. The following may be totally or in part objectives for a meeting NLM attends:

- ☐ Provide education on products and services
- ☐ Introduce new users to products and services
- ☐ Increase usage of products and service
- ☐ Introduce new products and services
- ☐ Perform market research
- ☐ Project an image and increase NLM name recognition
- ☐ Produce an effective pre-show promotion
- ☐ Obtain exposure in other areas
- ☐ Promote the National Network of Libraries of Medicine

## Measurements

Effective measurement tools can be as simple as they are or far more sophisticated than is presently implemented. At present the following is utilized:

- ☐ Total number of people visiting booth
- ☐ Total number of demos done
- ☐ User comments

Should also include in the post-show report:

- ☐ Any evidence that a pre-show promotional campaign was effective
- ☐ Comments on the at-show literature and promotional efforts.
- ☐ Comments on products and services of other vendors exhibited or discussed during the meeting
- ☐ Other activities such as demos in technology areas, program presentations, pre or post-conference or other training done, facilitation of speakers on the program, etc.
- ☐ Evaluation of NLM's booth in relationship to others in the exhibit hall. What type of image was presented?
- ☐ Comments on whether new &/or existing customers visited the booth.
- ☐ Description of the hotel and exhibition facilities.
- ☐ Any repairs that are needed to the booth.
- ☐ Your recommendation as to whether we should exhibit at this meeting in the future.

Anecdotal evidence on usage suggests the exhibit program does create awareness and, therefore, increased usage. Examples of exhibit report and evaluation forms will be provided by NLM.

## SELECTING MEETINGS AND EXHIBIT SPACE

### Selecting Meetings

The question, “Do you think we should go to this meeting?” is asked each year as a new schedule is developed. There are several factors that can assist in the decision. These could include: Have we been to this meeting before and what results were obtained? Who is the primary attendee – MD, PhD, nurse, consumer, administrator, clinician and so forth? What other online information vendors go to this meeting? How many people attend the meeting? What new products/services do we have to promote to this audience? Is the location of exhibit area advantageous? Have special arrangements been made to increase traffic in the exhibit area? Of course, what is the cost of space?

Much of this is a judgement call on your part based on your and other’s experience in the health information and healthcare delivery field. Also, when approaching new frontiers, such as consumer health, imagination must be your guide and experiments must determine the most effective venues for exhibiting.

The following is a few words on regional shows. There are several advantages of going to these shows. The audience profile tends to represent a higher concentration of end users than national events. There are more opportunities to talk longer and on a more personal one-on-one basis. The costs are much lower. There is a potential for more booth traffic because people share a registration by splitting days. It is a great way to test market new products or promotions. Knowledge of local economic and political affairs assists in understanding your visitor and providing solutions that solve problems common to their geographic area.

On the other hand, there are challenges as well. The exhibits are usually not as professionally run so special programs for increasing booth traffic may not be available or are not well run. It necessitates more effort on your part to get the visibility and results you want.

### Selecting an Exhibit Space

Once you have decided to go to a meeting, the next most important decision is the selection of space. Sometimes you may not have a choice where you are located. Associations use a point system to rate exhibitors. For instance, if you have exhibited previously and if you sponsor events you gain more points. When possible to select your space, the following are the things that should be considered:

- ❑ Find the main entry door and position your space so that your booth is either visible from the entrance or in a main artery off of the entrance.
- ❑ Consider a high traffic area such as the food service, Internet/e-mail workstations, restrooms, or poster sessions.

- ❑ A corner booth gives you visibility from two approaches.
- ❑ Avoid locations where walls, columns, power sources, near loading docks & freight doors or in dead end aisles, would hide you.
- ❑ Frequently booth space for the following year is reserved immediately following the current show. After checking with the National Network Office, a reservation may possibly be made immediately.
- ❑ Every effort should be made to reserve space early for the best possible location.
- ❑ Other locations may be strategically beneficial. These would include being near a large and high traffic vendor like a pharmaceutical company or the Association's booth.
- ❑ Occasionally it is possible to exhibit in another company's booth (e.g. pharmaceutical company), an Association's technology center or in the Association's booth. There is a big advantage to doing both our own booth and staffing one of these locations.
- ❑ If training were to occur in the booth, it would be beneficial for the trainer to use a microphone. Some meetings specify exhibitors cannot use audio enhancement systems or at least need clearance to do so. If allowed, it is recommended that a location be found that is the least obtrusive to other vendors. This might be with one side exposed to the food service or a wall.
- ❑ Typically the exhibit booth cannot be higher than 8 feet nor can it wrap more than 4 feet to the sidewall. The side panels cannot be higher than three feet. Check floor plan for height of ceiling.
- ❑ Refer to previous reports about the hotel/convention exhibit area for special notes.
- ❑ Space at a regional meeting may be nothing more than a small table and will require far less planning and preparation.

## PLANNING GUIDE

Knowing why attendees visit exhibits is the first knowledge needed for effective planning. Consider the following reasons:

- ❑ To be educated
- ❑ To find solutions to known problems
- ❑ To decide on or finalize vendor selection of post-meeting purchases
- ❑ To identify new products, services, or methods
- ❑ To meet technical experts
- ❑ To assess industry directions
- ❑ To obtain information

The following information is to be used as a guideline for large national scientific meetings. The actual experience can be quite variable. Regional meetings will require far less planning and effort.

The decision to exhibit at a meeting is made 6-18 months in advance when possible. Planning for the exposition should start immediately. It is generally necessary to have at least 16 weeks between the “go” decision, the contract signing and the date of the exposition. The potential for both error and higher costs emerge if the planning is not given enough time.

### Calendar

#### 6 to 12 Months Prior to Exhibition

- ❑ There will be a call for exhibit suggestions from the National Network Office. From these suggestions, a draft schedule will be formulated which will be approved by the NLM Director. Last year’s schedule, *The Encyclopedia of Associations* and the *Annual Directory of Medical Meetings* can be of assistance in locating meetings you might wish to Recommend.
- ❑ Request a meeting prospectus as soon as you feel it is likely you will go to the meeting.
- ❑ To the extent possible, this is the time for you to look at potential local and regional meetings at which to exhibit.
- ❑ Work with Associations or meeting planners to get training &/or speakers on the program.

#### 4 to 6 Months Prior to Exhibition

- ❑ Establish a budget.
- ❑ Finalize arrangements for speakers &/or training.
- ❑ Determine a pre-show promotion and PR plan if applicable and the budget allows.

## Weekly planning begins:

### Weeks 16 and 15

- ❑ Determine the products and services to be demonstrated. Get agreement from the Network office.
- ❑ Consider creating audience specific handouts.
- ❑ If the Exhibitor Kit has arrived, ***read it with care***. Pay special attention to the rules and deadlines. The amount and cost of union labor you are required to use for setting up your display varies state by state and show by show. Generally you can do more of the work yourself in right-to-work states. The packet will contain applications for everything you need including chairs, carpet, drapes, electricity, labor, hardware rentals, etc. Make note of the contact person for the exhibits. For more detailed information see exhibit set-up on page eighteen.
- ❑ Rough out a basic plan with staff needs.

### Weeks 14 and 13

- ❑ Start recruiting booth staff. Your best outreach and technical people should staff the exhibit and they should meet the guidelines set for staffing as listed on page 10. Team up new and inexperienced with your best and most experienced booth staff.
- ❑ Review the objectives with the exhibition staff.

### Weeks 12 and 11

- ❑ Establish a work schedule.
- ❑ If not already available, arrange for printed materials to be available in the booth (bookmarks, brochures, etc.)
- ❑ Content and design for pre-show direct mail to be done if budget allows.
- ❑ If sponsoring training &/or speakers, make arrangements for audiovisuals
- ❑ Prepare a few “canned” searches appropriate to the specific meeting to be used to demo when the visitor does not have a specific information need.

### Weeks 10 to 6

- ❑ Check progress and finalize staff recruiting.
- ❑ Prepare an information package for booth staff. This could include: Description of the show and why it was selected, overview of attendees, goals and objectives of the show, description of the products/services to be featured, special promotion and/or giveaway description, schedule and all report forms.
- ❑ Check budget now that more information is available from suppliers.

### Weeks 5 and 4

- ❑ Confirm availability of product samples, literature and the provision of any special technical help required from other sources. If staffing an exhibit for NLM in DC, request literature and giveaway items from NLM.
- ❑ Finalize travel and hotel arrangements.
- ❑ Finalize any special training arrangements.



- ❑ Obtain visitor information from the exposition city.
- ❑ Order any needed rentals and services.

### Weeks 3 and 2

- ❑ Finalize shipping information and provide to vendors. If self-shipping an exhibit, do so now or earlier if required on the show specs. Ship to advance address if at all possible. Shipping to show site can create problems.
- ❑ Ship promotional materials to site. Consider sending it to your hotel as an alternative to the convention site.
- ❑ Send pre-event package to staff people.
- ❑ Prepare a back up demos on diskette.
- ❑ Finalize audiovisual and other details for training &/or speakers.
- ❑ If a direct mail promotion is to be done, it should be mailed now. It should arrive in hands of attendees 7-10 days prior to meeting.

### Week 1

- ❑ Organize supplies, tickets and copies of service orders.
- ❑ Prepare for any payments needed on site.
- ❑ Bring photocopies of all show orders to resolve any on-site disputes.

### At the Exposition, Before Opening

- ❑ Confirm arrivals of exhibit, equipment, services, and supervise setup of the booth.
- ❑ See Exhibit Installation and Dismantle instructions page eighteen.
- ❑ Conduct pre-event training meeting and rehearsal at the booth as needed.

### During the Exhibit

- ❑ Think of your customer contact as a reference interview. Use your detective-like abilities to determine what his/her needs are and demo NLM products that will specifically meet their needs. In the case of consumers this is a new frontier. They may not even know they have a need. This is your opportunity to teach them about who NLM is and how NLM's products might be of assistance to them.
- ❑ Observe the person's name, title and institution on their name badge. It can frequently give you helpful information on tailoring your responses to their specific needs. This would be an opportunity to let them know about their RML.
- ❑ Exhibit hours vary and may fall on evenings and weekends. Two individuals should staff the booth at all times to allow for breaks, lunch and heavy traffic times.
- ❑ Watch the convention schedule and staff appropriately. Both staff members should be in the booth during the convention lunch period (unless there is a keynote address), during breaks and during exhibit hall activities such as the opening of exhibits and receptions.
- ❑ Restock literature and giveaways as needed.
- ❑ Whenever possible, conduct daily meetings with booth personnel to assess progress, process paperwork and adjust promotion needs.
- ❑ Make arrangements for dismantling and shipping the exhibit.
- ❑ Reserve next year's space if possible.

- ❑ When exhibiting alone exceptions will need to be made on food and beverage in the booth. For the brief moments you must be away from the booth, try to get help from a neighbor to watch equipment.

### After the Exposition

- ❑ Supervise the dismantling process.
- ❑ Send thank you e-mails both inside and outside of the library, immediately.
- ❑ Complete paperwork and send to Network Office.

## **Guidelines for Staffing**

Choosing the appropriate team to work the exhibit is the key to success. Selection, training, orientation and management of the personnel involved make the difference between a sound investment of time and money and a futile effort. Individuals assisting with exhibits should be:

- ❑ Knowledgeable about NLM and NN/LM activities, products and services. This requires an overall knowledge of the organizational structure of NLM and the NN/LM in order to direct people to the appropriate person, fact sheet, or department for a question not related to online database searching. Examples: DOCLINE, HMD, SIS, NCBI, Grants, PubMed Central, and others.
- ❑ Knowledgeable about and able to demonstrate in depth: IGM, PubMed, MEDLINE*plus*, NLM's web site, LOCATOR*plus*, TOXNET (general knowledge), MeSH browsers, and the Web in general. The individual is to have used these systems often enough to be proficient in performing searches on each, navigating the product efficiently, and utilizing all the various system features. Examples: Applying limits, linking to full text and understanding the current status of these links, using Related Articles, ordering documents, finding Fact Sheets on various subjects, printing, saving to disk, using other databases in IGM etc.
- ❑ Familiar and comfortable with using laptop computers. To be proficient in setting up hardware (computers and plasma screens when indicated) and troubleshooting communication (modem or Internet) set up and connectivity problems.
- ❑ The individual will need to be familiar with the booth structure if they will be supervising the set up or tear down.
- ❑ Excellent communicators. Must present an outgoing, positive and professional manner in dress and eagerness to engage visitors in conversation, to listen and be responsive to customer questions. Must keep in mind the limited amount of time available (3-10 minutes) to promote NLM and give good customer service.
- ❑ To be “on the job” (standing in the booth) at the designated times. Booths are not to be left unattended.
- ❑ Willing to complete an exhibit evaluation form and take care of all administrative details, such as counting visitors to the booth, stocking and keeping track of promotional items, and transporting computers as needed.

Since a thorough knowledge of NLM products and services is required when working in the booth, an ongoing training program should be a part of any staffing plan. When new booth personnel are used, they should work the first few times with a very experienced staff member. Disabled staff members should be provided with special equipment or mobility accommodations as needed.

Administration and management personnel should not be considered as booth staff. They need to be available to respond to individual requests for their time.

## **Working with the Association**

The following is given as a guideline only. These things can be done if you have the available time, talent and budget to do this. Coordination of course offerings, program presentations and other offerings at meetings may be done in cooperation with National initiatives arranged by the NLM Director of Promotion and/or the NN/LM Network Office Consumer Health Librarian.

Getting on the Association's program is an important goal if at all possible. Keep in mind most Associations begin their program planning immediately after the conclusion of the current meeting. Use your own contacts or work with NLM to locate possible speakers for "hot topics". These have included in the past, sessions on evidenced-based medicine, telehealth, the computerized patient record, and health resources on the Web. Generally a product demonstration is not considered an important topic for the program.

In addition to general program content, the Associations are often sponsoring technology labs where vendors are welcome to demo and train. Pre and/or post-conference training may be possible. Occasionally, Associations will highlight products in their own booths especially if they have a separate information technology booth as has been done with the American College of Cardiology.

Contact the program chairperson &/or the chairperson for specific functions (technology) at the Association for more information on ways in which a cooperative effort could benefit their membership. The librarian at the Association can also be a very important contact. You will merely be a facilitator utilizing your knowledge of the products and services of NLM, mainstream developments in medicine funded by NLM, and the needs of the target populations of the meeting.

Your efforts to get on Regional, State, Local and small association programs may be far more productive. Utilization of speakers within your institution or within your region is often times very effective.

## BUDGET

The exhibition program is a mainstream marketing effort. A good budget requires integrated, strategic planning followed by careful scrutiny of all possible expenses. The simplest budget strategy is to sit down with last year's show schedule and add 5-10 percent. The following list includes items that need to be considered when making up your budget. Keep in mind that many of these will not be necessary expenses for a local or regional meeting. Occasionally free exhibiting can be negotiated for free training.

Space Rental

Freight/Drayage to Warehouse and to Dock

Exhibit Installation & Dismantle Which May Require One or More Trade Unions

Electrician Per Hour & Per Outlet

Janitorial Service (Carpet Vacuuming)

Booth Refurbishing (Amortized Over All Meetings)

Floral/Plant Service

Furniture & Carpet Rental

Equipment &/or AV Rental

Telephone or Internet Line

Promotion (Pre-Show Direct Mail & Giveaway Items)

Mailing

Travel

Hotel

Meals

Last minute changes and missed deadlines can wreak havoc with a budget. So plan early and follow the rules closely for each show. An appropriate budget form will be provided by NLM.

## PUBLIC RELATIONS AND ADVERTISING

Although NLM cannot do advertising in the traditional sense - paid for space in publications – it can do many things that are the equivalent of a pre-show advertising and public relations campaign. All of this will require longer range planning and is not represented in the Section 4 Planning Guide. In addition, some of these ideas may require unavailable expertise and budget. These are ideas for you to consider, modify, or discard. For any of the items other than the description in the exhibitor's portion of the program, the Office of Communication and Public Liaison at NLM can be of assistance. A campaign might include:

- ❑ Writing a vendor description. Most exhibit applications allow a 50-100 word description which will appear in the final program &/or exhibits brochure. These are required for many meetings. See previous descriptions for format. Also, see if it is possible to be listed in electronic or paper guides under other names such as PubMed, MEDLINE, or MEDLINE*plus*.
- ❑ Producing a press release and media packet for the Press Office. This might be especially important when new products/services are being debuted. You might consider watching NLM's site for press releases that are occurring. A special seminar/workshop is worthy of an announcement.
- ❑ Producing “ads” or PSAs and ask for them to appear in the Association’s newsletter published regularly or specifically for the meeting. NLM produces PSAs and you might want to look at these for possible use.
- ❑ Attempt to get an article in an Association publication about NLM within 3 months prior to the meeting. This article would have to have a broad appeal about the research, grants, history, etc. of NLM, not product descriptions.
- ❑ In the case of a more local effort, such as a community fair for MEDLINE*plus*, local TV and radio spots may be possible.
- ❑ If attending a library meeting, place an “ad” in your own paper and electronic publications.
- ❑ In all cases, Public Relations, Publicity, Pre and At-Show promotions, there must be a consistent message. This means to use logos on all materials and have a consistent “look and feel” (branding) to all printed materials and if a catchy subtitle can be envisioned, use it on all materials. This is something such as “Rehabilitate Your Information Needs” used on a pre-show mailing for the American Academy of Physical Medicine and Rehabilitation.

## PRE-EXHIBIT PROMOTIONS

In exhibiting, the bird that catches the worm probably sets his alarm at least four months in advance to plan a method of convincing breakfast to come to him. About 76% of attendees leave home already having decided which booths they want to visit. On average, attendees spend time at 25-30 booths per show, about half of which were on their original list, and spend about 11 minutes in each. More and more companies are investing in pre-exhibit promotion to win a spot on attendees' selective agendas. Pre-exhibit promotion increases attendance by up to 33%.

### Direct Mail

The primary pre-show promotion that can occur is a direct mail campaign. Direct mail campaigns can be costly and may be beyond your budget. They could be considered on a smaller scale for local or regional meetings. The most effective mailing campaign needs a minimum of three pieces mailed at planned intervals, beginning 7-8 weeks prior to the show. However, a single piece arriving 7-10 days prior to the meeting can also be effective.

The following are some basic guidelines for developing a mailing campaign:

- ❑ Establish a timeline for your campaign so that all design, approvals, labels purchases, printing and mailing can be done in time to reach attendees 7-10 days prior to the meeting.
- ❑ Develop materials of interest to the specific target audience.
- ❑ Differentiate NLM from other information vendors.
- ❑ Develop a benefit-oriented message.
- ❑ Send to highly targeted list (pre-registered attendees). A registrant list can be bought from the Association. Keep in mind that they will want to review the piece before it is mailed. Give yourself enough time for this process. Hint: Do not use the words training or education in your mailer. They often reject this as competition with their CME programs. Use demo or other such soft terms for training sessions in the booth.
- ❑ Mailing must go to a specific name.
- ❑ Always mail first class.
- ❑ Include incentive to visit booth when possible. This could be a drawing. Consider having them bring the card to the booth for an incentive. This might assist in determining effectiveness of the mailing.
- ❑ Be sure to put the name of the meeting and your exhibit space number on all materials. Consider putting it adjacent to the mailing label.
- ❑ If a general mailing list is used, an invitation to request information if not attending the meeting could be incorporated.
- ❑ If exhibit passes have been provided, consider sending them to people in the convention city.
- ❑ Have several people proofread a piece before printing.

Designing the mailing piece can be a lot of fun. People don't buy things; they buy solutions to their problems. Therefore, your planning must uncover what problems the target audience is trying to solve. A powerful promotion frequently positions the exhibitor as the buyer's solution

and moves your exhibit onto the “must see” list. Samples of direct mail pieces can be gotten from NLM.

The following are some guidelines for developing a mailer:

- ❑ Say what is good about your product – be clear, honest and informative.
- ❑ Consider using a metaphor by drawing a relationship between your product and something else. E.g. “Good Medicine for Your Information Needs”, “Rehabilitate Your Information Research”, “Getting to the Heart of Your Information Needs”, etc.
- ❑ Highlight a unique characteristic of your product. E.g. NLM, the Original Source of MEDLINE or Brought to you by NLM, The World’s Largest Biomedical Library, or Commercial-free, etc.
- ❑ Evaluate ads and campaigns in journals and other publications to give you ideas.
- ❑ Don’t be too cute.
- ❑ Problem solution approaches might include: saving time, brought to you by authorities in the field of information research and dissemination, providing another resource for your patient’s questions, reliable, used since the 1800s and committed to the future, etc.
- ❑ Again, maintain any branding images such as the logo, themes, colors, and type fonts.

## **Web ListServ Promotions**

When an appropriate ListServ exists, consider putting an electronic direct mail piece online to invite attendees or local individuals to your booth.

## AT-EXHIBIT PROMOTIONS

**Product and service** discussions and demonstrations are the focal point of the exhibit. You are there to teach, answer questions and present a positive image for NLM. Thorough knowledge of the products and services of NLM will make this possible. Various guides, Dos and Don'ts given throughout this manual should help, as well as, the training received from NLM and the RML.

**Premium Incentives** (giveaways) are used for communication, motivation, promotion and recognition. They can build goodwill, communicate a message, create awareness, promote an idea, concept or theme and the benefits of using your products/services. They can communicate a very specific message about a new service, where you are located, how to reach you and what you can do to satisfy a need. If you think about the function before you look through the catalogs, you will be miles ahead of those exhibitors who buy trinkets and junk just to have something to give away. A list of currently available incentives is in Appendix 4. When using incentives for your next exhibit consider the following:

- ❑ What do you want to achieve by giving away an incentive item?
- ❑ What promotional message/slogan do you want to convey?
- ❑ What benefit will your visitor get from this gift?
- ❑ How does the incentive tie-in with your overall marketing and branding effort?
- ❑ Is this the image you want your target audience to have of your company?
- ❑ What will your visitor have to do to qualify for the gift?
- ❑ What is the budget?

Additional guidelines:

- ❑ Quality is critical. If you attach no value to the item, neither will the attendee.
- ❑ Talk to a visitor before handing over a gift. Use the gift as a means of saying thank you for stopping. Keep the gifts generally out of reach to avoid "hit and run". If there is no exchange of information between you and the customer the gift has little benefit.
- ❑ A useful gift is retained.
- ❑ On the desk is better than in the desk.
- ❑ Order well in advance.
- ❑ Unique is better than expensive.

**Daily newspapers** published at the meeting offer an opportunity to promote NLM. In your pre-show planning contact the Association meeting planner to determine the schedule, requirements and deadlines. Write brief paragraphs or put together a display ad inviting people to the booth

**Conference bags** can occasionally be stuffed with invitations, fliers and other promotional items. In addition, conference nametag lanyards are an inexpensive promotional item that can give high visibility when handed out with conference bags.



**Drawings/raffles** can be an effective promotion vehicle and can be done on a schedule in the exhibit booth or for training classes. You should check the sponsor's rules on raffles.

**Computerized Conference Guides** can be used to alert people to your booth, special events, products and services. You will need to determine if there is a fee for this service.

**Literature Distribution Areas** and conference bulletin boards can be used to distribute invitations to visit the booth, product descriptions, class schedules, etc. Consider ordering an excess of the direct mail pieces for this purpose.

**Auxiliary Events** provide opportunities for promotion. They may include product presentations as a separate event, poster sessions, technology exhibit areas sponsored by the association, pre- or post-conference courses, and visits to customers in the area but not a part of the meeting.

## EXHIBIT ORDERING, INSTALLATION & DISMANTLE

### Using the NN/LM Exhibit Booth

NLM provides each RML with an exhibit booth/backdrop to be used at National exhibits. The RML may have a portable backdrop for regional or local meetings. The RML is to make all arrangements for scheduling, fees, shipping, equipment, installation/dismantle, storage and staffing. This information should be taken into consideration in planning for exhibiting and at exhibit set-up and tear-down.

Generally labor will be required if set up takes any tool greater than a pocketknife. The number of unions you will have to hire varies from city to city. The job functions of each union are clearly defined. However, from time to time you run into jobs that need to be done that are not clearly belonging to one union or another. In this case, read the instructions carefully and if in doubt consult the exhibit coordinator.

In NYC for example, there are six unions used for show set up - Teamsters, Carpenters, Carpet Installers, Electricians, Decorators and Exposition Workers. The challenge is getting the work done in the order necessary and in the timeframe allowed. Plan early, before set up day, what your needs will be. Labor must be ordered. Their general workday is from 9-5 with breaks and lunch scheduled during this time. Workers tend to end the day at 4:45. Any work done outside of this timeframe will be charged at a significantly higher overtime rate (1 1/2 to 2 times the rate). The union laborers are only trying to get their job done according to the rules. It is up to you to know the rules and coordinate your labor requirements.

### Shipping

Generally, you shipments should go out about a month before the last date of acceptance indicated on the drayage form in the Exhibitor's Packet. Penalties are charged for late arrivals. Shipment problems may occur when on the borderline when shipments should go to the exhibit storage site or exhibition hall. It may result in your exhibit not being delivered on time or at all. The following information applies whether you are shipping your exhibit or you have an exhibit house doing it for you.

Each piece should be labeled with the NN/LMs name and with the necessary complete address information for the drayage label: name of show, date of show, your booth number(s), your organization name, and the complete address information of the drayage firm. Be sure to number the crates sent, for example, one of six, two of six, and so forth. Hand carry with you a complete listing of what was sent.

Logical organization of materials in the crates can save time in set-up. Careful repackaging of contents can prolong the life of the booth by protecting against damage in shipping.

Separate boxes of promotional materials and exhibit kits can be sent. Again, pack carefully to avoid damage. Pack them fully. Partially full boxes, even if padded, tend to collapse during

shipment. Again, number these boxes and have as part of the inventory list. Reusable and expensive promotional materials should be shipped back the RML.

A minimal amount of promotional literature/paper should be shipped and used in the booth. Some people feel that they haven't "done the exhibits" unless they collect a piece of literature from each booth. The chance, however, that those people will actually read what they have collected is remote. Consider taking peoples names and sending them the required information. Consider sending diskettes to download a search or a fact sheet for someone to carry home instead of a printer in the booth.

There is always limited space in a booth for promotional material storage. Check with the Show Management Desk to determine if there is an immediate access storage area where excess materials could be stored and retrieved as needed.

In a survey of vendors, 80% of shipments were sent using trucking services, UPS was used 35% of the time, express mail 22%, air carriers 24% of the time, and 12% for all others. A combination of these methods may be used. In all cases check delivery times and specific requirements of the shipper.

Be sure to hand carry the following: PCs (unless using shipping cases especially designed for that purpose), telecommunication phone numbers in the exhibit city, software, demonstration cheat sheets, originals of all handouts should you need to get copies made, all conference paperwork, booth schedule, copies of all speeches and transparencies, labels for return shipping, list of emergency phone numbers, business cards, pocket knife and anything you might have difficulty buying in a strange city.

## **Exhibit Ordering and Installation**

The following information will provide the necessary guidelines for ordering and subsequently setting up the exhibit. On the day of the installation, plan to wear comfortable shoes and "working clothes". This is a dirty job. So much of what one must negotiate and do requires the knowledge that only comes with experience.

You will pick up your registration badge and packet then go to the exhibit hall to locate your booth and check on delivery of shipments. Three unions begin work without your instruction. They include the Teamsters who unload and load trucks and vans, the Exposition Workers who will bring the Teamster-unloaded shipment to your booth and the Decorators union who set up the booth spaces. Nothing can be done until these three unions have done their work.

Inventory the materials that have hopefully been delivered to your booth. Check and make sure that there is rear access to your booth. If there is none, immediate contact with the electrical and telephone contractors is necessary before the carpenters set up the booth. The electricians and telephone contractors are mobile, that is, they will not necessarily have a desk to which you can report. You may just have to ask around for them.

Follow-up on any missing exhibit materials at the Exhibit Service Desk to check on arrival times. When you know you are ready, check into the Show Management and Exhibit Service Desk to order carpenter labor for setting up the booth. The earlier you can get on the list the better.

***Do not sign*** an incomplete (without total hours written down) labor form. If there is a disagreement, deal with it then - after you return to the office is too late.

Electricity: Of all the forms you complete prior to the meeting, this is the one that is the most complicated. Keep in mind that options are offered for exhibitors requiring large amounts of electrical output for specialized equipment and may be of no interest to you.

You should have a booth drawing and electrical requirements mapped prior to ordering electric. Determine what measurement of electricity the show vendor requires (amps or watts). Convert with the following formula:  $WATTS = VOLTS (120 \text{ in US}) \times AMPS$ . Check the equipment that is to be used. The following is an example only.

Example: If you have	Three 150-w bulbs	450w
	Two PCs	480w
	Two monitors	250w
	One printer	<u>240w</u>
		1,420w

This would require one 1500-watt line with multiple receptacles or one 500-watt and one 1,000-watt line. Keep in mind that the wattage requirements of all pieces of equipment on a single line **cannot** exceed the wattage capacity of the line. If multiple lines are ordered, ask that they be labeled. The number of outlets required is determined by location and maximum watts/amps allowed per outlet. The power source should be as close to the equipment as possible. Avoid extension cords running across the floor of the booth.

The installation of the electric by the Electrician's union must be scheduled to coincide with the carpet laying and booth construction. Running cabling under the carpet will require it be done before the carpet is installed. If extension cords are to be used and there is easy rear access to the booth, the electrician can arrive anytime.

Carpet: Either the Carpet Installers or Decorators union generally installs the carpeting. You should order carpeting when in an area already carpeted for two reasons. Carpeting that already exists in the convention area may clash with your booth and the added comfort provided by a double layer of carpeting can be very useful. A critical point to consider when you juggle times and schedules is that the carpet has to go down before any exhibit booth construction can begin but after the electrician if you have cables to be run.

Carpenters: In large cities such as NYC and Chicago, labor must be ordered to construct your booth. Some cities require you to have one skilled and one assistant and some do not. Only the very largest booths will require more than two carpenters. Know the rules of the city you are exhibiting in. It is important to check in with the Service Desk just prior to your scheduled construction time to reconfirm that you are ready and waiting. Your job will be to supervise the construction to be sure it is set up properly. Once the exhibit booth has been erected the crates will be closed and labeled for storage. Examine the labels to be sure they are correct.

Telephone/Internet: Telephone and Internet connections are ordered on the exhibit form. A telephone/modem connection is generally ordered. NLM will provide an 800 dial-up to the Internet. If ordering an Internet connection, obtain in advance the Internet configuration information from the source. If using your own hardware, the IP addresses can be configured in advance. If you are renting equipment, it is general configured by the rental company.

If you are using two or more PC's hooked to the Internet, you will need to split the signal. You will need to rent a "hub". The hub splits the one signal to your two or more PC workstations. Installation generally occurs without your knowledge.

Furniture: Furniture can be anything from fancy padded comfortable chairs to wastebaskets. Tables can be rented to hold equipment and literature. The standard size is two by six feet but is available in eight-foot lengths. You can order risers to get the table to an easier height to view a monitor when standing (which most customers are doing). Don't forget to order draping or skirting. The Decorators union usually puts this on and the Exposition Workers union delivers the table. Order a single counter-height color coordinated chair or none. They take up valuable space in the booth. The only practical use of this chair is for staff when there is no traffic in the exhibit hall or for a staff member who is disabled. These items, rented equipment and other specialty items are generally delivered at random during the general hours of set up.

Color selections: These will be made for chairs, table draping and carpet. Choose colors that coordinate best with the exhibit booth and that match each other.

Equipment: The question is whether to rent or ship. An audiovisual company will supply a flyer in the Exhibitor's Packet. The advantages of renting include not having to carry or ship, insurance, onsite service and quick replacement if broken (make sure this is all included). If you decide to rent, request equipment and software that you are familiar with using.

Using your own equipment provides the obvious value of providing a familiar set up in a way you are accustomed to using. Special applications are easier to use and having a computer in your room in the evening for e-mail is an advantage. If the equipment is damaged, getting it fixed or replaced can be a definite disadvantage.

Whether rented or shipped all PCs should be tested to be sure the telecommunication hook ups are working properly. If using your own equipment, it should be removed from the exhibit hall when the booth is not staffed.

Check with the show sponsor before deciding to order a microphone. In some cases it is forbidden. In others, locating your booth in an area of least intrusion to your neighboring exhibitors may be possible.

Miscellaneous items: Order a wastebasket, possibly a literature stand (although we should try to get away from excessive literature in the booth), and cleaning. The booth should be vacuumed after set-up and during the evening if excessively dirty. If a raffle is to be done, a fishbowl or other receptacle for cards should be ordered.

Literature is the last thing to be unpacked. Arrange literature neatly avoiding a cluttered appearance in the booth. Restock periodically rather than put excessive amounts out on the counter tops. Giveaways should remain concealed until personnel are in the booth.

Even with the most careful planning and timely ordering of labor, you may find that things do not run smoothly. Generally, anything can be fixed. The carpeting can be cut to run cable after it has been laid the carpenters will come back when a crate is missing, etc. etc. Don't panic. It somehow miraculously all gets done, even if only shortly before opening of the exhibits.

Sometimes payment will be due immediately for these quick fixes so carry some form of payment with you, cash, check or credit card.

### **Exhibit Dismantling**

Breakdown is great. Tasks that seemed to take days during setup will be completed in hours. You are dealing with fewer unions and there is less critical timing to manage. Remove everything you are shipping back or discarding from the display so that labor can begin their work. Set aside all items that will be hand carried. Security at this point is very important. Since the booth will be torn down and all carpet, tables etc picked up, you should secure your valuable on your person or in your room.

Get shipping labels from the Service Desk in advance. Prepare a label for each item being shipped back. Be sure to remove all old labels to avoid errors in shipping. ***Be sure you have brought with you the correct address of where each item is to be shipped.*** Sign and keep a copy of all bills of lading. If the exhibit materials are to be sent to another show, label them as required by that show.

As soon as the shipping containers are delivered to your booth, go to the Service Desk to request labor. You can speed things along if you are there to help. For some reason, union "laws" regarding your contributions don't seem as strict during breakdown as during setup. Label each container as it is finished. When labor is done, accompany them to the service desk and sign them out - again noticing the time reported for which you, through your signature, are agreeing to pay.

When a show closes mid afternoon and there are many vendors, there is always a chance of not completing the job before labor quits. There is not much you can do about this other than go out and have a nice dinner and come back the next day. Just be aware that this is a possibility.

## Using the NLM Booth

From time to time the NN/LM is asked to staff a meeting in Washington, DC or nationally to which the NLM booth will be sent. There are some special considerations in the set-up, dismantling and use of this booth. If you would like to view the actual set-up of the booth, a video has been included with this Exhibit Management Manual.

The Exhibit Manager for NLM, will make all arrangements for space rental, freight/drayage, exhibition installation & dismantle, contractor arrangements, electrical, communications, janitorial, ordering carpet and furniture, equipment &/or AV rental and floral if needed. NLM contracts with an exhibit management firm (currently Exhibit Group/Giltspur from Seattle) to make all show arrangements.

In addition to staffing the booth, the NN/LM staff will be asked to supervise the installation & dismantle of the booth structure. This is for good communications, to insure proper set-up and for security reasons. The NLM Exhibit Manager will supply you with all the proper paperwork for the show and contact information for the exhibit management firm. The following procedures should be followed.

- 1) If for any reason the exhibit contractor does not show up for the installation or dismantle you will have the vendor exhibit manager's name and number. If there are problems with the physical structure during the meeting, the exhibit manager should be contacted.
- 2) You will be responsible for checking and insuring that all the cabling has been done correctly on the computer and plasma screens. A detailed description and diagram will be provided by NLM.
- 3) You will be responsible for testing the telecommunications and plasma screen hook ups. Information on the plasma screen will be provided by NLM. The computer manual is in the computer travelling case.
- 4) You will be responsible for disconnecting the computers from the telecommunication lead and power and taking them to your room or car at the end of each exhibit day. Also, the equipment should not be left unattended while the exhibit is open. Although the equipment is insured, the safe keeping of this equipment will be your responsibility during the show. The travel case has a handle and wheels if you would prefer to use it for transport.
- 5) The exhibit has limited space for storage. This storage needs to be used for the promotional items used during the exhibition. Plan to check or leave in your car/room everything other than your essential needs in the booth. This includes coats, briefcases, shoes, etc.
- 6) This exhibit booth was designed for the minimal use of paper. Do not plan to hand out numerous Fact Sheets etc. Giveaways are to be stored in the plasma screen counter and put on the computer counters as needed.
- 7) There will be no printer in the booth. If you desire to hand out searches done, plan to bring a supply of diskettes to download the search results.
- 8) Carefully observe the dismantling of the booth to insure that all NLM owned cables are put back in their cases. There is an inventory in the computer case.
- 9) If any NLM equipment should be stolen, an immediate police report and loss report should be made.

## **Resources for Assistance**

All national exhibitions and many regional ones have an onsite exhibit contractor. Telecommunication, electrical, booth cleaning, equipment (rented), and shipping problems and questions should be reported to these onsite exhibition management desks. On occasion, it is more productive/expedient to determine (at set up) the names and numbers of individuals for specific functions and go right to them. This is particularly true in the case of telecommunications and equipment problems. Of course, they have no responsibility for our equipment (computer & plasma screens) but if needed their services can be contracted to troubleshoot problems of NLM or NN/LM owned property. As mentioned above, when the NLM booth is being used, the NLM contractor can be contacted for problems associated with the booth installation/dismantle, structure problems and problems associated with getting exhibit contractor assistance.

Be sure to have all documentation with you. It can assist in locating missing portions of the shipment. If literature doesn't arrive consider instant copying services from the masters you have carried or if on a working day, send a FedX package to your hotel. As a last resort, take names and mail things to people after the show.



## THE DOs AND DON'Ts OF EXHIBITING

DO	DON'T
<ul style="list-style-type: none"> <li>❑ Present an outgoing, positive and professional manner combined with an eagerness to engage visitors in conversation, to listen and be responsive to customer questions.</li> <li>❑ Designate a person to arrive 30 minutes early at the start of the exhibit each day to turn on all lights and hardware.</li> <li>❑ To arrive at the exhibit 15 minutes before scheduled time and to complete paperwork before leaving.</li> <li>❑ Take a 15-minute break every two hours and a 30-minute lunch break if working the full day.</li> <li>❑ Register for the meeting as NLM, not NN/LM.</li> <li>❑ Promote NLM products <u>only</u>.</li> <li>❑ Be alert to traffic and engage those standing in the aisles in conversation.</li> <li>❑ Listen and be empathetic to your customer's needs. Listen 80% of the time and talk about your products 20% of the time.</li> <li>❑ Smile and maintain eye contact.</li> <li>❑ Ask open-ended questions beginning with who, what, where, when, why and how.</li> <li>❑ Keep the booth stocked with promotional items.</li> <li>❑ Clean up the booth throughout the day and at the end of the day.</li> <li>❑ Take time at the beginning or the end of your time in the booth to evaluate other vendor's products and promotions.</li> <li>❑ When you do not know the answer to a question, take a person's name and offer to send them the answer to their question.</li> <li>❑ Dress in conservative business attire. Less formal attire is acceptable if attendees dress informally.</li> <li>❑ Wear comfortable shoes.</li>   <li>❑ <b><i>Relax, have fun and enjoy the conference. The positive feedback you get from attendees is a real boost to morale. Share it with your</i></b></li> </ul>	<ul style="list-style-type: none"> <li>❑ Do not leave the booth unattended.</li> <li>❑ Do not sit in the booth if there is any traffic in the exhibit hall.</li> <li>❑ Do not eat or drink in the booth. <i>(Inconspicuous beverages to countermand continuous talking or excessively hot exhibit hall are OK.)</i></li> <li>❑ Do not store excessive amounts of personal or other individual's things in the booth.</li> <li>❑ Never say anything negative about another vendor's product.</li> <li>❑ Do not close the exhibit early.</li> <li>❑ Do not cross your arms when talking to visitors.</li> <li>❑ Do not spend the booth time chatting with each other.</li> <li>❑ Avoid, whenever possible, giving lengthy product demos to the other vendors.</li> <li>❑ Do not call people by their first names unless you know them.</li> <li>❑ Do not leave NLM or NN/LM PCs unattended in booth and do not leave in booth overnight.</li> </ul>

*colleagues.*

<Sample Documents to be Added>